

TAXWARE TIMES

WINTER 2021

SINCE 1979



Happy Holidays

from Taxware Systems

JOIN US!

**TAXWARE SYSTEMS ANNUAL
SEMINAR NOW WEBINAR**



**REGISTER TODAY!
DECEMBER 14TH & 15TH, 2021**

TAXWARESYSTEMS.COM/SEMINAR

HOSTED ON
zoom



TAXWARE SYSTEMS ANNUAL TAX WEBINAR FOR THE 2021 TAX YEAR

With all the favorable feedback we received from last year's Annual Seminar-turned webinar, we have determined that we will continue again this year with the same Zoom Webinar format. The ability to reach so many more of our Taxware family of clients at such a critical time of year is important. We are thrilled that the challenge of not being able to meet in person had a silver lining and we learned that this new way could be even better.

You must register for each session you plan to attend.
You will receive an email with the Zoom link and password for each session.

Mark your calendars! Taxware has many great things to share.



GIVEAWAYS - THANK YOU TO OUR PRIZE SPONSORS!



TAXCOMM

**FREE 1 YEAR SUBSCRIPTION
\$300 RETAIL VALUE**

THE TAX BOOK
Real Answers. Real Fast.

**FREE 1 YEAR SUBSCRIPTION
\$279 RETAIL VALUE EACH**



VISA GIFT CARD



VISA GIFT CARD



2 - VISA GIFT CARDS



NEWSLETTER INDEX

Annual Seminar.....	1
Letter From Us.....	2
Did You Know?.....	2
Tech Tip: Custom Client Grid.....	2
1099 Accumulator Form 4419.....	2
TaxComm.....	3
Program Release.....	4
Proforma Organizer.....	4
Textellent.....	4
TheTaxBook.....	4
Bank Enrollment Reminder.....	4
Taxware Team Spotlight.....	4
Taxware Out & About.....	5
Refer-A-Friend.....	5



HOLIDAY HOURS

Our office will be closed for the days listed below to celebrate the winter holiday season.

CHRISTMAS EVE

December 24th, 2021

NEW YEARS EVE

December 31st, 2021



LETTER FROM US

Wishing you and yours all the best for Christmas 2021. Our thoughts are with you as we continue to endure the changes and challenges brought about by the pandemic. It is our hope that you are able to spend the holidays in peace and reflection on the many things there are to be grateful for.

We are truly grateful for you!

Wishing you all the best,
Your Taxware Team

DID YOU KNOW?

Advance Child Tax Credits that were part of 2021 tax returns contain details that can easily be noted in the Wintax *Due Diligence* feature. Why not maximize our *Due Diligence* option to be sure you are maintaining information most important for your records? This feature not only allows you to craft your own sets of questions, but also saves any data you input about your clients for use in next year's returns. You can store up to 9 additional "yes/no" *Due Diligence* questions. Plus, there is space for more notes! **These questions and answers are not** transmitted to the IRS during E-File. They are for your reference in case of an audit or other line of inquiry.

DUE DILIGENCE SCREEN

To use this feature, in the due diligence screen of Wintax, select the option Additional Questions. Then type up to 9 questions that will be asked of everyone needing to complete due diligence this year. Finally, check the box that states "Lock Questions".

ADDITIONAL QUESTIONS SCREEN

Now, all preparers will have access to these questions and can answer them, making your records that much sturdier should the IRS ever come knocking.



TECH TIPS

The Custom Client Grid is back! In a recent update we've put back in the option for a customized Recall Client screen. You can now choose which columns show up in which order on your Wintax Recall Client screen. Don't care about the prior year unpaid bill? Remove it! Want the taxpayer's Home Phone Number to show up on your client grid? Add it! Read more about it on our blog post linked below:

[taxwaresystems.com/
custom-client-grid](https://taxwaresystems.com/custom-client-grid)



1099 ACCUMULATOR FORM 4419 UPDATE

For those that participate in the IRS F.I.R.E. - "Filing Information Return Electronically" filing program using Taxware's 1099 Accumulator program, effective September 26, 2021 Form 4419 is being replaced. The IRS requires you to revise your Form 4419 to include email, and contact information etc. This can take up to 45 days to process. Please complete this soon because of the January 31, 2022 deadlines. This affects clients that electronically file forms 1096, 1099-NEC, 1099-Misc, 1099-INT using Taxware's 1099 Accumulator program.

Learn More Here:

[irs.gov/forms-pubs/about-form-4419-
application-for-filing-information-
returns-electronically-fire](https://irs.gov/forms-pubs/about-form-4419-application-for-filing-information-returns-electronically-fire)

Form 4419 Here:

irs.gov/pub/irs-pdf/f4419.pdf

FOLLOW US ON

facebook
FB.COM/TAXWARESYSTEMS

YouTube
TAXWARE SYSTEMS



THE COMPLETE CLIENT COMMUNICATION TOOL

Developed with the Tax Professional in mind.



AT THE OFFICE, AT HOME, EVERYWHERE YOU WANT TO BE



TaxComm is wherever you are and allows you to communicate with your clients effectively, regardless of where in the world you may be.

TaxComm's secure, web-based program combines the things you love from Zoom™, Messenger™, DocuSign™, & Dropbox™ types of programs, into one easy to use dashboard.

ALL OF YOUR TOOLS IN ONE PLACE

DESIGNED BY TAX PROFESSIONALS *FOR TAX PROFESSIONALS*



**SECURE FILE
REQUESTS**



**SECURE
MESSAGES**



E-SIGNATURE



**VIDEO
MEETINGS**



Including a Taxpayer synced **mobile application** for picture and document upload as well as document signature!

TRY TAXCOMM FOR FREE TODAY!

TAXCOMM.NET

PROGRAM RELEASE

The initial release of our 2021 Tax Year software will be available for download by December 17th through the **Client Login Portal** located on our website.

An announcement of the exact date will be made via email and within the messages of your programs.

taxwaresystems.com/users/clientLandingPage.asp

PROFORMA ORGANIZER

The Proforma Organizer has been updated for the 2021 tax season. It is available to download on our website at the provided link below. If you are currently registered through our website and we have your current e-mail address, you should have received an e-mail notification with a link to this newsletter. If you didn't receive an e-mail notification, please go to our website and register. This also enables you to use all of the additional support tools available to you on our website.

taxwaresystems.com/users/clientLandingPage.asp

Textellent INTEGRATION

The Textellent application is integrated with Wintax for your quick ability to use the dates and public information from your client's return to send automated yet personal communications.

Texting has 99% read-rate within 2 minutes! Textellent offers a unique Personalized Texting service, designed specifically for Tax & Accounting Professionals. Their service includes self-service appointment scheduling and appointment reminders. Text messages are personalized, relevant and come from a "real" phone number enabling two way communication.

textellent.com/webinar/Taxware

THE TAX BOOK Real Answers. Real Fast!

As a client of Taxware Systems you are entitled to receive 10-25% off all TheTaxBook products and free shipping year-round! When ordering, be sure to use Taxware's Promo Code to ensure you receive the negotiated discount.

Order at: thetaxbook.com/TaxwareSystems
Taxware Promo Code: 785

Learn more using the link below about the 5 Free Services included with every order.

taxwaresystems.com/thetaxbook

BANK ENROLLMENT REMINDER!

Don't Forget! Now is the time to enroll with your selected bank if you choose to provide bank products as an option for your clients to pay your tax preparation fees.

taxwaresystems.com/bank-enrollment-instructions

Although it is still unknown when the official tax season will begin, Pre-Tax Season advances provided by the banks are usually available for your customers as early as January 2nd.

Want to learn more about this option?

Visit our webpage that explains the bank integrations provided through Wintax 1040.

taxwaresystems.com/bank-products

TAXWARE TEAM SPOTLIGHT

With a desire to work for a small business and become a meaningful part of a supportive team, Genie joined Taxware Systems in 2017. She accepted the role of administrative assistant and excelled, but soon enough we realized that Genie would be able to bless us with so much more. Having earned a B.A. degree in multimedia art & design she came to us experienced, working with brands like Nike™, ThinkThin™, and Behr™ Paint. Her artistic skills have been put to full use and her influence can be seen on every publication, website, and software program that Taxware and TaxComm release. In short, Genie makes us look our best!



When asked to share her favorite thing about working at Taxware she declared that "it is because we are a family here. We celebrate birthdays and holidays; we even celebrate if a team member achieves a personal goal they were working towards." When she is not creating or administrating for Taxware, Genie loves to spend time snuggling with her cats or traveling with her fiancé. They try to go somewhere new at least once a year. Kayaking, camping and anime conventions are some of her favorites.

Her passion is to create art for her Etsy shop where she promotes self-love and advocates for people who need help having their voices heard. She strives to do as much good as she can and to leave a legacy that will make an impact.

Genie has surely made an impact here at Taxware and we are thankful she chose us.

Visit her Etsy shop here:
etsy.com/shop/strawberryblondieart

TAXWARE TEAM OUT & ABOUT

With all the changes and restrictions required of businesses, it seemed that having our traditional Taxware holiday celebration in the summer might be difficult. This year, to make our events more Covid-19 friendly, we split up into two groups and did things a little more casual.

The amazing tech team took a day trip to the Natural History Museum in Los Angeles and had delicious french dipped sandwiches at Philippe's. The fabulous sales team went up to Big Bear for an adventure of hiking and zip lining. We were thrilled to be together again after almost a year of working remotely.

Like you, we are constantly adapting to change. As with many of life's challenges, we can learn and grow from them. We hope that you are able to see and experience many positive things in your lives despite the burden the pandemic has caused. We are grateful to be your tax software provider.

ZIP LINING



DINOSAURS



HIKING



We are thankful for you!



REFER-A-FRIEND LIMITED TIME OFFER

We are thankful for you! If you refer someone to us, and they sign up by Christmas, we will give you \$100 off of your software.

Ask your friends to call us today at 800-877-1065, so they can also -

EXPERIENCE THE TAXWARE DIFFERENCE

